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ABSTRACT

This guide, part of a series of workplace-developed materials for retraining factory workers, provides teaching materials for a workplace course in writing memos. The course covers recognizing the audience for a memo, identifying the topic, organizing the writing using four steps (think, write, review, correct) writing complete sentences, using correct punctuation, and using a standard memo format. It includes sample applications using memos common in the workforce. The introductory materials include course objectives, a topical outline, teaching methods, materials needed, and evaluation methods. Lesson plans for three sessions are provided. The session materials include teaching notes, information sheets, exercises, and worksheets. (KC)

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Techniques for Better Memo Writing

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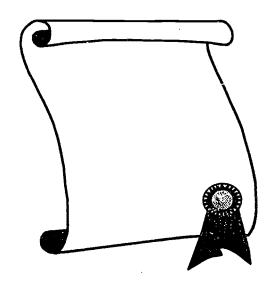
PEOPLE RETRAINING FOR INDUSTRY EXCELLENCE

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Techniques for Better Memo Writing



Mercer County Community College

Division of Corporate and Community Programs 1200 Old Trenton Road Trenton, NJ 08690

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United States Department of Education National Workplace Literacy Program

1995



ACKNOWLEDGMENT

Mercer County Community College thanks Carol Lewandowski, Senior Education Specialist/Curriculum Developer for creating this manual. Through her valuable contributions employees in manufacturing and service industries learned concepts relevant to their existing jobs and strategies for learning other tasks if that opportunity should arise.

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WORKPLACE SKILLS TRAINING PHILOSOPHY

A factory or service center creates a classroom that is very different from the one we are used to seeing in colleges and adult schools, so it only follows that our approach to teaching in the factory should also differ.

Our goal is to teach employees skills that they need in order to be functional and successful in their work environment, and encourage them to apply those skills on the job and at home. For example, we motivate students to do the following:

- work more efficiently and more safely
- make fewer mistakes
- solve problems working interactively
- take greater responsibility for their jobs
- recognize the interconnectedness of the various jobs in their workplace
- be better communicators in the workplace

Company needs are revealed through a needs assessment. At that time, we also determine the basic skills needs of the employees. We are learner centered, as the individual employee's needs are considered alongside those of the company.

Once we have determined those needs, we develop curricula that incorporate basic skills, using the workplace literature (e.g. forms, applications, codes, abbreviations, charts and tables, handbooks, regulations, procedures, policies, memos, letters) of the company. Because each company is different, the needs and literature are also different; hence, we develop new materials for every company in which we teach. By utilizing these workplace items, we help students transfer and apply their skills directly to their jobs.

We rely on the classroom techniques of problem solving, cooperative learning, and group discussion. Our overall approach is concept based, with the emphasis on application, such as in role plays, dialogues, and group work. Despite the specific course titles, we incorporate the elements of math, English, and communication skills into all of our sessions.

In terms of students evaluation, after initial testing we give a pre-test and post-test in order to determine comprehension. Students receive feedback throughout the course from the instructor, as well as from fellow students as we sincerely believe in the powerful positive reinforcement of peer critiques and cooperative exchanges.

In essence, we believe that although we make the materials for the students with which to work, it is the students who truly make the class.



TECHNIQUES FOR BETTER MEMO WRITING

OBJECTIVES:

At the end of this course, students will be able to do the following:

- recognize their audience
- name their topic/main idea before writing
- organize their writing time using the 4 steps
- use the standard memo format
- write complete sentences
- brainstorm
- use correct punctuation
- get their point across using clear and specific words
- recognize and avoid bad writing: redundancies, repetition, wrong usage, wordiness
- write memos that have a clear and strong intended action/effect
- write memos that are reader friendly (using bullets, lists, numbers, etc.)
- put the audience's needs for information first

TOPICS:

- writing diagram
- topic selection and specification
- 4 steps of writing
- standard memo format
- complete sentences

METHODS:

- individual writing
- peer critique
- worksheets and review
- class discussion



TECHNIQUES FOR BETTER MEMO WRITING

MATERIALS:

- diagrams
- handouts and worksheets
- lists
- sample company memos
- student generated memos

EVALUATION:

- students evaluate their own work
- in peer critique, students evaluate each other's work
- instructor evaluates completion of memo

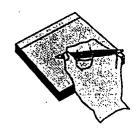


PRE-CLASS MEMO WRITING

In the space below, write a memo about something familiar to you, or about something that you really have to communicate. Don't worry about organization, spelling or grammar just yet — merely write your typical day's memo.



SESSION 1 ◆ GUID FLINES



Guidelines for Writing Memos

- 1. Be complete
- 2. Be concise
- 3. Be clear
- 4. Be correct
- 5. Be organized



THE STEPS FOR WRITING MEMOS



1. Think



2. Write



3. Review



4. Correct



WRITING DIAGRAM

Writer

Memo

Audience







What purpose?

What topic?

What knowledge?

What information to to get across?

Details?

What relationship?

What style? Tone?

What format?

What purpose?

What action to cause?

How to cause it?

What to do as a result?



TYPICAL MEMO FORMAT

COMPANY

Memorandum

(flush left)

TO: Name, Title

FROM: (initial after your typed name, title)

SUBJECT: (be clear and specific)

DATE: date of writing

∠(Do not indent here)

This is a memo about how to format your memos. Do not indent the first sentence on the left. Instead, keep your paragraphs flush left.

Even if you start a new paragraph, keep it flush left – avoid the temptation to indent!!

Remember to keep your memo SHORT — no more than 3 paragraphs. The best memo is one that is a **single paragraph** with **bullets**, **numbers**, **stars**, or **lists** to make the information more accessible to the reader. If your memo runs on to 4, 5, 6 even 7 paragraphs, then something is wrong!! Reconsider your format and consider writing a report or proposal.

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P.R.I.D.E.

A GOOD MEMO

Here is a sample of a good memo. Why is it so good?

COMPANY

Memorandum

TO: Steve Miller, Production Manager

FROM: Lori Jones, Human Resources

SUBJECT: PRIDE Classes

DATE: 5/6/94

The PRIDE classes with Mercer County Community College have started this month. These employees will be attending the Writing class from 5/8/94 to 6/9/94, Mondays and Thursdays, 1-3 p.m.

George Abrahamson
Lisa Carter
Bob Lewis
Greg DeMonico
Barbara Gatto
Paula Porter
Jean Inverner
Donna Smith
Paul Jones
Carol Zabrinski



COMPLETE SENTENCES

Even when you write the briefest memos, you must use **complete sentences.** A complete sentence is one that has the following:

- 1. a subject
- 2. a verb
- 3. a complete thought



SENTENCE TYPES

1. Simple Sentence:

- contains a subject and verb
- expresses a complete thought
- considered a single independent clause

Examples:

- ♦ He came to work at 8:00.
- ♦ They brought the materials to the warehouse.
- ♦ Third shift starts at 11:00 p.m.

2. Compound Sentence

- contains two independent clauses joined by a FANBOY
- (for/and/nor/but/or/yet/so)
- expresses a complete thought

Examples:

- ♦ He came to work at 8:00, but he didn't start working until 8:30.
- ♦ They brought the materials to the warehouse so they could store them.
- ♦ The managers had a meeting and they decided to offer more overtime.

3. Complex Sentence

- contains a main clause (independent clause)
- contains a subordinate clause (identifiable by a word or an expression whose completion relies on the main clause: since, because, although, even though, before, after, while, during)
- expresses a complete thought

Examples:

- Even though he had no time, he volunteered to reorganize the shelves.
- ♦ Since they took on the account, they have received many inquiries.
- ♦ She packed the bottles after she took them off the machine.



COMPLETE SENTENCES

	ad these sentences and determine if they are complete. In write C on the line. If not, then write I and try to determine	
1.	Although our gross figures are down.	
2.	Reorganizing the work schedules to accommodate those with second and third jobs.	
3.	The information has arrived via modem.	
4.	Before he came to this department.	
5.	Please inform me of any production changes before our next meeting.	
6.	The maintenance department, the utility department, and the packing department.	
7.	Helping with the boxes and teaching the new workers how to pack the boxes.	
8.	The office picnic, which is always held at Mercer County Park.	
9.	The new smoking policy has gone into effect.	
0.	Which means no one can smoke in the cafeteria.	



SENTENCE PUNCTUATION

- 1. Period at the end
- 2. Capital letter at the beginning

EZ comma rules:

- ◆ IC, IC. = comma splice
- ♦ He works overtime, he has a good attitude.
- The machine is down, we can't use it.
- To fix a comma splice, use one of the **FANBOYS** (for, and, nor, but, or, yet, so):
 - ♦ He works overtime, and he has a good attitude.
 - ♦ The machine is down, so we can't use it.
- > Or make them 2 separate sentences with periods at the end of both:
 - ♦ He works overtime. He has a good attitude.
 - ♦ The machine is down. We can't use it.
- > Or use a larger word of dependence and a semicolon:
 - ♦ He works overtime; moreover, he has a good attitude.
 - ♦ The machine is down; therefore, we can't use it.



SENTENCE PUNCTUATION

EZ run on rules

- ➤ If you have a **run on** sentence, then it is like a comma splice but without the comma:
 - ♦ He did the SPC for that machine he made a chart.
- > Fix a run on any of the same ways that you fix a comma splice:
 - ♦ He did the SPC for that machine and he made a chart.
 - ♦ He did the SPC for that machine. Then he made a chart.
 - ♦ First he did the SPC, and then he made a chart.

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SENTENCE PUNCTUATION

This memo is a nightmare of run ons, comma splices, and other format problems. Rewrite the memo and fix the problems.

COMPANY

Memorandum

TO:

John

FROM:

Tim

TOPIC:

Insurance

DATE:

8/6

The new insurance forms have arrived they are in Donna's office. Which is next to the receptionist area so you can pick up your new forms there. And fill them out.

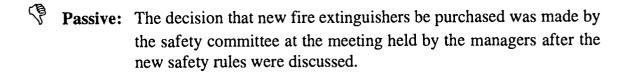
Give them back to Donna when you are finished make sure you have signed the form at the bottom. On the line. If you have a spouse then he/she must sign it also the deadline for these to be returned in Aug. 4, 1994.



SESSION 2 ◆ BE ACTIVE!!

Avoid the **passive voice** and use the **active voice** when you write – not only does it save words, but it gets your idea across in a clearer style and with less possibility for confusion.

Look at the difference between these 2 voices – both sentences express the same idea, but which would *you* rather *read*?



Active: At the managers' meeting, the safety committee discussed the new safety rules and decided to buy new fire extinguishers.

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P.R.I.D.E.

BE ACTIVE!!

Rewrite this memo – take it out of the passive and put it into the active voice.

COMPANY

Memorandum

TO:

Office Personnel

FROM:

President Jones

SUBJECT:

Smoking Policy

DATE:

9/4/93

It has been brought to my attention that the most recent non-smoking policy has been violated by employees. The policy was written by the safety committee 2 months ago, and was promptly implemented by supervisors and line leaders 1 month ago. In that time, it has been violated and ignored by several employees, whose names shall remain undisclosed. Let it not go unnoticed that records are being kept and points are being given by me to those employees who ignore the new non-smoking policy.



BE CLEAR!!

Don't misplace or dangle your modifiers – this can cause confusion, not to mention hilarity!!

Example of a dangling modifier:

Broken and in need of repair, Steve tried to fix the machine again. (Poor Steve!!)

Correction:

Steve tried to fix the machine, which was broken and in need of repair. Broken and in need of repair, the machine gave Steve a hard time.

Example of a misplaced modifier:

The manager put the information with his secretary in the file. (Oh no!! Poor secretary!!)

Correction:

The manager put the information in the file and gave it to his secretary. (No doubt what happened!)

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BE CLEAR!!

What's wrong with these modifiers? See how you can fix them.

1. Working 10 hours a day and offering to stay late for clean up, the work was getting done by all of the hourly employees.

2. The janitor put the trash with his helper in the dumpster.

3. Having discussed the wage increases and vacation policy, coffee was poured for all of us managers.

4. The bottles are burnt by the new employees around the rims.



AVOID REDUNDANCIES

Sometimes we try so hard to get our point across that we get it across twice. For example, to rewrite means to write again, so if I rewrite the memo again I actually write it two more times, right?

Why are these expressions redundancies?

- 1. to closely scrutinize
- 2. to constantly persist
- 3. most favorite
- 4. incorrectly miscalculated
- 5. a joint cooperation
- 6. a wise insight
- 7. at 4:00 p.m. in the afternoon
- 8. a necessary requirement



AVOID WORDINESS

Remember this: **less is more**. The fewer words you can use, the stronger your message will be, and the easier for the reader to get your point.

Here are some traditional wordy expressions that we feel compelled to use when we write. In fewer and simpler words, what do they really mean?

At this point in time	
Despite the fact that	
In the event that	
During the time that	
In a hasty manner	·
We were not apprised of the fact that	
We will proceed to examine	
In a different manner of speaking	
At this juncture of temporal events	
Irregardless	
We are clearly of the same opinion	



AVOID WORDINESS

Also avoid inflated language. Don't try to impress or intimidate – remember that you are trying to **communicate**. Fancy or verbose language can **obfuscate** that purpose!!

Which is easier to read?

- Illumination is required to be extinguished on these premises after nightfall.
- Lights out after dark.

Here are some extreme examples of inflated language. What do they mean?

1. Perform a fluttering action, perform a fluttering action, minuscule illuminating and swirling astronomical body.

2. Propel, propel your craft, unobtrusively in the free flowing natural solution comprised of H2O.

3. The sample canines exhibited a 100% mortality rate.



CLOSE, BUT NO CIGAR

Be careful in your usage - a lot of words sound exactly or somewhat alike but are spelled differently and have different meanings. These sets of similar words are called **homonyms**.

The best examples of homonyms are the words to / two / too. What is the difference between them?

Here is a list of the most commonly confused words. Pick the ones that you have the most trouble with, look them up in the dictionary, and see if you can see the difference between the uses.

affect / effect moral / morale

its / it's right / write

their / they're / there instance / instants

advice / advise past / passed

device / devise your / you're

break / brake we're / were / where

personal / personnel principal / principle

stationery / stationary peace / piece

role / roll through / threw

week / weak weather / whether

bored / board hour / our

for / four choose / chose

loose / lose new / knew



CLOSE, BUT NO CIGAR

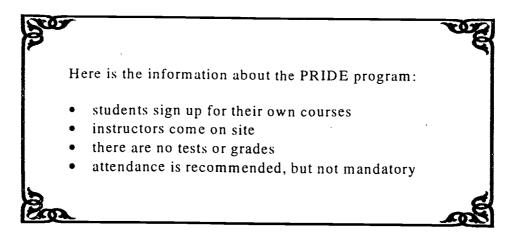
Circle the correct word to complete these sentences.

- 1. The secretary ordered new stationery / stationary supplies and then had to store them in the closet with the stationery / stationary shelves.
- 2. My **principal / principle** idea is not to overhaul the system, but to upgrade some of the operational **principals / principles**.
- 3. Take my advice / advise and work a few hours overtime it really is good advice / advise.
- 4. If you have a **personal / personnel** problem, then talk to one of our human resource people in the **personal / personnel** department.
- 5. The breaks / brakes on my car always break / brake after a cold winter.

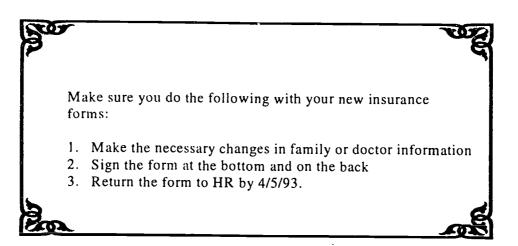


WRITE FOR EASY READING

Use **bullets** whenever you can to set off important information that can be read and processed quickly.

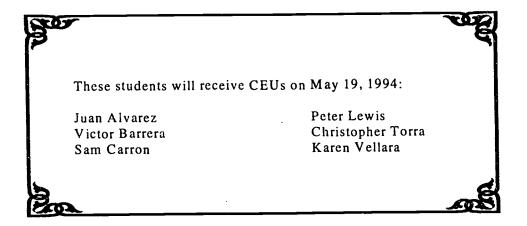


Use numbers when you are giving steps in instructions:

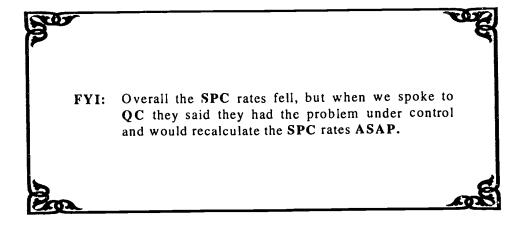


WRITE FOR EASY READING

Use lists whenever you can to make the information clearer and accessible:



Use abbreviations when you know that you reader will be familiar with them:



BE CONCISE!!!

Avoid big words that you feel might impress or intimidate your audience. Instead, use simple words with clear meanings:

We will **utilize** the new manual.

We will **use** the new manual.

The meeting will **commence** at noon. \rightarrow The meeting will **begin** at noon.

Here is a list of some awful and awfully overused "big words." What smaller words can you think of that are more concise and user friendly?

1.	terminate			_
----	-----------	--	--	---

2. administer _____

3. facilitate ____

4. facsimile

5. aggrandize _____



FORMAL AND INFORMAL TONES

- A formal tone does not imply big words and jargon. Instead, it requires professionalism and clarity.
- An informal tone, on the other hand, can be offensive as it might be too familiar or unprofessional.

Look at these 2 sentences and decide which is extremely formal and which is extremely informal.

- 1. Please be so kind as to reply immediately to our departmental concern.
- 2. If you don't answer my question, I'll come and raise the roof!

Your best bet is to aim for somewhere in the middle, keeping the professional tone but getting rid of the stuffy and inflated language:

3. Get back to me ASAP with a reply.





Read this memo and figure out what the topic is, the details, and the action: then rewrite the memo, getting rid of the jargon, glaring informalities, wordiness, and other verbal atrocities!

MEMORANDUM

TO:

All Employees

FROM:

Payroll

TOPIC:

Payroll

DATE:

August 4, 1993

This memo is to inform you that we are no longer using the same banking institution as we were previously utilizing. In other words, at this point in time we are making a change in our banking alliance.

The former institution, **Hamilton Trust**, has increased its checking user fees and instead of accepting that new fee policy we have decided to make a move to another banking institution. As a result of this most recent banking change, we will issue checks from our new account at **Packard Trust Co**. This new change will take effect with the checks that will be newly issued on August 20, 1993. The checks for this current week will still be drawn from our old account, and you can cash those as you normally would, under regular circumstances, at your convenience and in your regular manner at your preferred institutions of choice.

In the future, and only for a short period of time until which time your own banks recognize the change in our own company checking account, checks cashed at banks other than the previously aforementioned financial institution will require a form of identification (an ID such as a driver's license or social security card or work ID will be sufficient).

We are confident that this change is a change for the better. If you have any concerns or should you experience any problems whatsoever with this new account on your payroll check, please contact us as soon as is reasonably possible and we will get on the horn and get in touch with your financial institution and shake them up so they will cash your check without hassles.



SESSION 3 ◆ APOSTROPHES

, , , ,

Apostrophes for Contraction

1. Use an apostrophe to replace the removed letter(s):

we're

We are =

can not = can't

we have eaten = we've eaten

Note: He's could mean he is or he has, and you need to know the context to determine the tense.

He's tired = he is tired He's eaten = he has eaten

Write the contractions for these words.

1. Did not

7. Could not

2. Will not

8. I would

3. Should not

9. They have

4. It is

10. We are

5. She has

11. You are

6 She is

12. They would

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APOSTROPHES

Apostrophes for possession

- 1. Use an apostrophe and an S to show possession:
 - ♦ Carol's book
 - ♦ Lorna's pencil
 - ♦ the student's notebook
- 2. If the name/noun ends in an S, you have two options:
 - 1) add only the apostrophe:
 - 2) add the apostrophe and the S
 - ♦ Luis' book or Luis's book
 - ♦ Jesus' mother or Jesus's mother
 - ♦ the boss' office or the boss's office
- 3. If the noun is plural and you are showing plural possession, add the S to make the countable noun plural then add just the apostrophe
 - * the teacher's book = one teacher and his/her book
 - * the teachers' lounge = many teachers use the lounge
- **4.** If the spelling changes on the plural, make the change, then add the apostrophe after the S to show possession:
 - * the company's policy = one company
 - * the companies' policy = more than one company 35

APOSTROPHES

- 5. If the plural is irregular, use apostrophe S to show possession:
 - * the women's room
 - * the children's baby-sitter
- 6. If the plural and singular noun are the same, add apostrophe S:
 - * the sheep's barn
- 7. If you are using the possessive for an indefinite pronoun, use 'S.
 - * anyone's
- everyone's
- someone's

- * no one's
- somebody's

REMEMBER:

Possessive pronouns that replace the noun do not take an apostrophe:

yours

not your's

theirs

not their's

ours

not our's

hers

not her's

BE CAREFUL!

It is =

it's (contraction)

its

possession (no apostrophe for the pronoun possessive)

Example:

It's unfortunate that the company lost 10% of its profits.



COMMAS

1. Use a comma in a compound sentence between the 2 independent clauses and before the FANBOYS unless it obstructs the flow.

IC, for IC. IC, but IC.

Examples:

- ♦ He asked for a promotion, **but** he got a demotion.
- ♦ She had to go to the warehouse, so she left early.
- ♦ The shipment was late, **for** it was incorrectly addressed.
- ♦ QC checked the bottles, **yet** a few went out damaged.
- 2. Use commas around removable information.

Examples:

- ♦ The house, made of wood and cement, was demolished in 1988.
- ♦ The company, a turbine manufacturer, has three locations.
- ♦ Steve, who has worked for the company for 10 years, has taken his GED.



COMMAS.

3. Use commas to separate items in a list. The items can be things (nouns) or action phrases.

Examples:

- ♦ He brought nails, screws, tacks, and a hammer.
- ♦ They take the order, call the customer, check the order, and
- ♦ ship the merchandise.

NOTE: The final comma in the series before the "and" is optional, but it depends on the context. If the reader could be confused without the comma, then put it in.

Examples:

- ♦ He drinks tea, beer and milk.
- ♦ The afternoon garbage man will drive the truck, make the stops, eat and pick up the garbage.
- ♦ This being my last will and testament, I am leaving my estate to be divided
- ♦ among my sons: Bill, George and Steve.
- 4. Use a comma between a subordinate clause and a main clause.

SC, MC.

Examples:

- ♦ Even though it was 110 degrees, he was wearing a sweater.
- \Diamond Since they lost the key to the room, they had to break down the door.

NOTE: If you put the MC first, you don't need a comma. MC, SC

Example:

♦ They had to break down the door since they lost their key.(MC)(SC)



COMMAS

5. Use a comma to set of a direct quote.

Examples:

- ♦ He said, "The meeting will be at noon."
- ♦ They asked, "Where is the meeting being held?"

NOTE: In reported speech, omit the comma.

Examples:

- ♦ He said the meeting would be at noon.
- ♦ They asked where the meeting was being held.
- **6.** Use commas between adjectives of equal importance.

Examples:

- ♦ She is a wise, witty woman.
- ♦ The big, expensive, obnoxious American car was parked illegally.

NOTE: use a comma between adjectives when you would say "and"

Examples:

♦ The big AND expensive car is parked illegally.

But: The expensive American car (you wouldn't say expensive AND American car)



COMMAS AND SEMICOLONS

· , , ,

DO NOT use a comma between two independent clauses (IC, IC.). This error is known as a **comma splice**, because you are *splicing* together two ideas that could stand independently.

- ♦ He was late, he came to work at 9:00.
- ♦ They never replaced the part, the machine was down all week.

HOW TO FIX A COMMA SPLICE?

1. Use a period to separate the 2 clauses, making 2 separate sentences.

IC. IC.

2. Use a comma and a FANBOYS to separate the 2 clauses.

IC, so IC.
IC, for IC.
IC, but IC.

3. Use a semicolon to separate the 2 clauses.

IC; IC.

4. Use a semicolon and a transition word (followed by a comma) to separate the 2 clauses.

IC, and IC.

IC, yet IC. IC, nor IC.

IC; however, IC.
IC; nevertheless, IC.
IC; negardless, IC.
IC; consequently, IC.

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SEMICOLONS

Semicolons are the most underrated piece of punctuation! Give them a chance and let them work for you!

LONG ITEMS or CLARIFICATIONS IN A LIST:

1. Use semicolons between long or wordy items in a list, and commas between the adjectives and phrases.

Confusing list with commas:

There were several reasons why she hated going to the warehouse alone: the dark, damp space scared her, the extreme quiet rankled her nerves, made her skin crawl, and left her tense, and her fear of being locked in, a fear that stemmed from her childhood, froze her in her tracks.

Clearer list with semicolons and commas:

There were several reasons why she hated going to the warehouse alone: the dark, damp space scared her; the extreme quiet rankled her nerves, made her skin crawl, and left her tense; and her fear of being locked in, a fear that stemmed from her childhood, froze her in her tracks.



SEMICOLONS

2. Use commas between items and clarifications, then semicolons between the separate items in a list.

Example:

Many people attended the meeting: Paul Smith, President, Ken Lewis, Vice President, Stan Heim, Marketing Representative, and Paula Stenhouse, the secretary.

How many people attended that meeting?

Many people attended the meeting: Paul Smith, President; Ken Lewis, Vice President; Stan Heim, Marketing Representative; and Paula Stenhouse, the secretary.

How many people attended this meeting?

Note: If you are giving titles and names, be consistent - if you start with the title, then keep starting with the title followed by the name. It doesn't matter which style you choose, just be consistent!



COLONS

1. Use colons to introduce a list. MAKE SURE that you have a complete sentence before the colon.

Example:

Many different classes are being offered in out PRIDE program: English, Math, and Writing.

But not The classes are: English, Math, and Writing.

Example:

The new shift times are as follows: A (8-3 p.m.), B (3-11 p.m.).

But not The new shift times are: A (8-3 p.m.), B (3-11 p.m.).

Biggest COLON error: using including and then a colon.

Wrong: We have many classes, including: Math, English, and ESL. (Since the colon is like saying "including," what you are saying is including including – a clear redundancy!!)

Right: We have many classes: Math, English, and ESL.

2. Use a colon to come to a conclusion or generalization.

Example:

He had no other choice: he had to change shifts. The wheels were broken, the radiator was smoking, and the fenders were falling off: her car was a piece of junk.



PUNCTUATION REVIEW

Put any and all punctuation into these sentences (:;,?.).

- 1. During the meeting the manager was shrewd clever and controlled but the order went to the companies competition
- 2. In spite of the Equal Opportunities Act women still find it difficult to move up in the company let alone become president
- 3. We thought we would have to work over the Labor Day weekend therefore we were delighted when we finished the order two days before schedule
- 4. When does the managers meeting take place
- 5. The employees handbook is updated occasionally when there are policy changes when there are holiday changes and at the end of every year

